

Name_____

Date_____

Financial Planning Checklist

Use the following checklist and point scale to as a guide when completing your report.

ASVAB Results: Attach ASVAB results and interest inventory with report!

Career Option 1:

Career utilizes Top 3 Interest Codes _____ (5)

Career is congruent with Skills Ratings _____ (5)

Career Option 2:

Career utilizes Top 3 Interest Codes _____ (5)

Career is congruent with Skills Ratings _____ (5)

Career Research: Attach research and works cited with report!

Career Option 1:

Annual Median Income _____ (5)

Required Education _____ (5)

Career Option 2:

Annual Median Income _____ (5)

Required Education _____ (5)

Post-Secondary Institution Research: Attach research and works cited with report!

Career Option 1:

School of Interest _____ (5)

(Private College/State University/Other)

Cost of post-secondary education _____ (10)

Career Option 2:

School of Interest _____ (5)

(Private College/State University/Other)

Cost of post-secondary education _____ (10)

Analysis: Attach financial resource cards and supporting calculations with report!

Family Contribution and Scholarship:

Annual financial input calculated _____ (10)

FAFSA interest rate used:

Graduating year interest rate recorded _____ (5)

Career Option 1:

Loan payoff amount calculated _____ (10)

Monthly education loan payment calculated _____ (5)

Payment/Income percentage rate caculated _____ (5)

Career Option 2:

Loan payoff amount calculated _____ (10)

Monthly education loan payment calculated _____ (5)

Payment/Income percentage rate caculated _____ (5)

Evaluation: Include developed assessment and proposed future plan in report!

Comparison

Cost-to-Benefit ratio used in comparison of career options _____ (10)

Future Plan:

Developed Financial Plan aligned with assessment _____ (10)

At least two money saving strategies incorporated _____ (5)

Total: _____ / 150 points